Burkina Faso - Telecoms, Mobile and Broadband - Statistics and Analyses

Description:
Airtel launches an m-health insurance service, following success in Ghana
This report provides a comprehensive overview of trends and developments in Burkina Faso's telecommunications market. Subjects covered include:
Key statistics;
Market and industry overviews;
The impact of the global economic crisis;
Regulatory environment and structural reform;
Government policies affecting the telecoms industry;
Market liberalisation and regulatory issues;
Telecoms operators privatisation, IPOs, acquisitions, new licences;
Major players (fixed, mobile and broadband);
Infrastructure development;
Mobile voice and data markets;
Internet and broadband development and pricing;
Convergence (voice/data, fixed/wireless/mobile);
Broadband and mobile data services and pricing trends;
Mobile Average Revenue per User (ARPU).

Despite fresh investment in Burkina Faso's telecom sector, new technologies have been slow to take hold. Delays in the development of a 3G service have hobbled the potential of broadband services. Nevertheless, the poor state of fixed-line networks have meant that in recent years the number of fixed-line subscribers has fallen steadily as customers migrate to the limited services available from the three mobile network operators. The fixed-line incumbent Onatel, majority-owned by Maroc Telecom, operates the country's fixed-line network, a CDMA2000 wireless network, a fibre optic backbone and one of three GSM mobile networks, Telmob.

Mobile telephony has experienced strong growth since competition was introduced in 2000 by Celtel/Zain (now Bharti Airtel) and Telecel International (now Moov). Although market penetration remains below the African average, it continues to grow steadily, including a 30% growth in the number of subscribers in 2012 alone.

Onatel's FasoNet is the country's leading internet service provider, dominating the broadband market with its ADSL and EV-DO offerings. Penetration rates in this sector are still extremely low and services remain expensive despite some price cuts since 2011. Being landlocked, Burkina Faso for long depended on expensive satellite links for its international bandwidth, though in recent years connectivity has been facilitated by transit fibre links through neighbouring countries which have access to the region's international fibre optic submarine cables: the four submarine cables which land in Ghana have reduced the cost of international bandwidth. A number of Burkina Faso's other neighbouring countries also have access to multiple international cables. However, consumers and the country's entire economy will only benefit from lower broadband prices if Onatel passes these cost savings on to them and also to other ISPs on the wholesale level.

The mobile operators have entered the underdeveloped internet sector by offering mobile data services using GPRS and EDGE technology, but third generation (3G) mobile broadband technology has not yet been introduced except for Onatel's EV-DO fixed-wireless service. An international tender for a new combined fixed and mobile licence was unsuccessful in 2010, while Viettel emerged as a bidder for the much delayed fourth mobile licence.

Estimated market penetration rates in Burkina Faso's telecoms sector end-2014 (e)

<table>
<thead>
<tr>
<th>Market</th>
<th>Penetration rate</th>
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<tbody>
<tr>
<td>Mobile</td>
<td>71%</td>
</tr>
<tr>
<td>Fixed</td>
<td>0.7%</td>
</tr>
<tr>
<td>Internet users</td>
<td>5.3%</td>
</tr>
</tbody>
</table>

(Source: based on various sources)

Key developments:
Bharti Airtel completes the sale of its local unit to Orange Group; government contracts Alcatel-Lucent to provide cloud networking technology facilitating digital public services; DTT scheme will miss ITU deadline due to lack of funding; SkyVision deploys a telecom network for Bank of Africa; Airtel and MTN launch money transfer service between Burkina Faso and Ivory Coast; regulator imposes fines on MNOs for breaches of network coverage and QoS conditions; Finance Act 2014 mandates a 5% tax on telcos; auction to licence a
fourth mobile player was scrapped by the government due to poor market interest Maroc Telecom inaugurates new telecom cable; international internet bandwidth increases to 1.1 Gb/s; Maroc Telecom deploys new cable linking Burkina Faso to Morocco, Mauritania, Mali and Niger; mobile penetration grows on the back of poor fixed-line infrastructure; Onatel reports a 6% growth in revenue for 2013; report includes the regulator's annual reports and market statistical updates to December 2014; telcos' financial and operating data updates, recent market developments.

Companies mentioned in this report:
Onatel, Telmob, Bharti Airtel (Zain, Celtel), Moov (Telecel, Etisalat), FasoNet, ZCP, Delgi, Cenatrin, CFAO Technologies, River Telecom, Net Access, Maroc Telecom, Vivendi.

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